



Economic Development and Growth for Enterprises

Corporate Social Responsibility HANDBOOK

Corporate Social Responsibility (CSR) Handbook

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Overview

This handbook is intended to provide a practical guideline and templates for developing and implementing win-win-win Corporate Social Responsibility (CSR) projects through strategic partnerships between Civil Society Organizations (CSOs) and the private sector. Win-win-win CSR projects are developed strategically and create value for the society by:

1. addressing social issues, while at the same time
2. creating value for the CSOs and
3. creating value for the private sector companies involved in the project.

1. Know Your Cause – Develop a Strategy

Understanding the purpose of your organization is the basis for developing any strategy, and this includes a social responsibility strategy. Both CSOs and private companies can benefit from strategies that incorporate social responsibility in overall organizational strategy.

For the CSOs, this means incorporating a revenue generating value proposition for sustainability that furthers a cause. It is critical in doing this to understand the cause and how this cause can add value to the private sector as well as to the community. Having this kind of revenue generation aspect will allow CSOs to be more sustainable and less reliant on grants or general goodwill, which is inconstant and hard to predict, impacting the ability to plan projects and activities.

Businesses too must understand the value proposition for any social cause that is supported. There are two approaches that companies can take while developing a high level CSR strategy:

- *Inside-out Approach:* Start with a business need and ask the question: “How can we satisfy that business need AND serve a social good?”
- *Outside-in Approach:* Start with a social need and ask the question: “How can we serve that social need AND increase shareholder value?”

In general:

- *Identify key social needs that you can effectively address*
- *Be specific in identifying the opportunities*
- *Have a clear and well-articulated strategy*
- *Make sure the projects that are developed are well-aligned with the high level strategy, organizational mission and goals*

2. Develop Your Concept Note

The concept note, which can be drafted either by the CSO or the private sector agent, can be used as a starting point for discussion with potential project partners. During the identification and selection of partners, the concept note can, and actually should, be modified to fit the goals and values of all the partners. The concept note, once adapted and updated, focuses the partners on what the shared goal and how each participant will benefit and what investment each will input. Most importantly, it documents openly the expectations of each partner so that from the beginning communication is open and honest. Finally, this note is used as an input for the development of the detailed project plan that will take place in the next phase.

- *Develop your concept note in line with the overall goal (developed above)*
- *Consider the different interested parties involved, including target groups and partners*
- *Use a phased-approach*
Splitting large projects into a number of smaller phases as appropriate makes it easier to plan, implement, and monitor the project. At the same time, using a phased-approach makes it easier to get stakeholders' buy-in as partners as they can join in the project for specific phases and continue their involvement in the project as they see fit.
- *Use a collaborative approach with partners and be willing to make changes*
Certain parts of the project should be developed collaboratively by the implementing partners or readjusted from the original plan after taking into consideration the interests, expectations, capacities, and strengths of all partners. When the CSO and the corporation co-design the solution, they both have a vested interest in its success.

A template for the concept note is provided in Annex A.

3. Find Your Partner(s)

No social partnership can be successful without an open and dynamic partnership that is based on trust and a mutual or shared value. For this reason, identifying and selecting the right partner for the social responsibility project is perhaps the most important step. Remember that the partnership includes more interested parties than just the CSO and private sector company. There are a host of other stakeholders who may need to contribute time and other resources, or in fact may be the target of the activities. For this reason, all stakeholders and their interests and concerns need to be taken into account.

- *Understand stakeholders and make sure their issues and strategic goals are addressed. Keep the interests of all the stakeholders involved in mind. Stakeholders may include implementation*

partners, companies, partner organizations, target audiences, the community at large, authorities, etc.

- *Identify partners (companies/industries/CSOs) that would strategically benefit from addressing the identified social need. Think about project partners that;*
 - share your values
 - complement your organization (have capabilities that your organization lacks, for instance)
 - would be as interested in the end result – even if not for the exact same reason
- *Provide value to the partnership – do not view your business partners simply as sponsors or as a name to lend credibility to the effort*
- *Consider the partnership as a long term collaboration instead of a short term engagement*
- *For meetings with potential stakeholders, be prepared and also be ready to make changes:*
 - Have a draft concept note and be prepared to present your case
 - Do your homework: learn about your stakeholders as much as possible before your meeting
 - Walk the potential stakeholders through steps involved
 - Be willing to make changes based on stakeholders' input
 - Meeting protocol: be prepared, have your materials ready, listen first, pitch second
- *Particularly, CSOs should approach companies with a value proposition:*
 - Here is how you can generate value for your company...
 - Solving a social need...
 - We can work with you to achieve this!

A very important question for the CSOs to think about is: “Are you the answer to a question that a corporate partner hasn’t asked yet?” This changes the mindset *from* the CSO wanting a contribution of time/money *to* detailing how the CSO could be of benefit to the corporation.
- *As a company, approaching social responsibility as corporate strategy can accrue benefits to the bottom line while also providing large social returns to the community. When developing a project, the following benefits to the firms should be considered:*
 - Creating a greater brand awareness or enhancing brand reputation
 - Expanding customer base and reaching out to new potential customer groups
 - Generating revenue from new customer groups
 - Gain market knowledge or information
 - Reducing costs or gaining new sourcing
 - Expanding into a new business market
- *Leverage partnerships for additional value*

A thorough understanding of the partners’ strengths and weaknesses can bring value to the projects in ways that may not be readily visible. Being open and honest will facilitate this process.

- *Evaluating CSR projects and partnership(s) is an iterative process, where the parties involved need to evaluate both the projects and the partners involved before committing to a partnership or project.*

4. Develop Your Project Plan

A detailed project plan should be developed as an expansion of the concept note, once it has been accepted by project partners. In addition to the topics covered under the concept note, the project plan specifies each partner's responsibilities and should include a time-tabled implementation plan, a complete budget, and a communication plan. A template for a project plan and associated tables are included in Annex B.

- *Accountability is extremely important for a company, and the CSO needs to deliver what it promises as part of the project plan. Thus, the project plan should be realistic in all aspects including implementation plans and expected results.*
- *Effective communication will expand the project's impact, create awareness, and will establish trust:*
 - Develop a communication plan for *internal communication* between partners to build trust and keep transparency in activities
 - Develop a communication plan for *external communication*. This should include media management as well as one on one communication with all stakeholders of the project.

5. Implement

The implementation plan developed during the planning stage, if done properly, facilitates effective implementation and monitoring of activities. It is important to understand the iterative nature of planning and be ready to accommodate for changes as necessary during implementation.

- *Understand the iterative nature of planning - nothing is written in stone*
- *It is important to have well-developed feedback loops to adjust and modify the plan as needed*
- *Keep the plan updated – make sure you accommodate for changes and keep the remainder of your plan updated accordingly*
- *Active communication with stakeholders involved is extremely important for effective implementation*

6. Measure, Monitor and Report

It is not enough to simply implement according to a plan. In order to understand the effectiveness of the project and whether it achieved what it set out to achieve, it is important to measure, monitor and report results.

- *Key success measures, including targets and what to measure should be defined up front*
- *Tracking should be done consistently and regularly for measuring results*
- *Reporting to stakeholders at a sufficient level of detail is important – various stakeholders may have different expectations. Also, intentionally measuring results in line with established targets and having statistics to report on makes it more likely for the companies to partner with the same CSOs in the future, as well as serving as a baseline for future projects.*
- *To streamline reporting, have a communication plan with details on: Who reports what, when, to whom, and how*
- *Note the importance of communication with media for visibility, grassroots support, and achieving objectives*
- *Agree with stakeholders early on regarding naming and branding of the project, and use a consistent branding throughout the project*

7. Review and Learn

The review and close out stage is often forgotten in the excitement of having completed a project. However, in order to understand what worked well and what could be improved, all participants need to be open and honest about the project experience. Building on lessons learned, future projects can be even better.

- *Review lessons learned – what worked and what did not*
- *Discuss future collaboration opportunities*
- *Use open dialogue*

Annexes

Annex A: Concept Note Template

I. Project Name/Slogan

II. Project Overview

Including: Background information, social issue to be addressed, project goals

III. Target Group(s)

IV. Overview of Project Activities

V. Communication Plan

VI. Draft Budget

Template for Budget

No:	Item	Quantity	Cost/item	Total Cost
1				
2				
3				
4				
TOTAL				

Annex B: Project Plan Template

I. Project Name/Slogan

II. Project Overview

Including: Background information, social issue to be addressed, and project goals

III. Target Group(s)

IV. Project Implementation Plan

Template for the Time-tabled Implementation Plan

No:	Project Action Item	Completion Date	Responsible
1			
2			
3			
4			
5			

V. Budget

Template for the Budget

No:	Item	Quantity	Cost/item	Total Cost	Responsible
1					
2					
3					
4					
TOTAL					

VI. Communication Plan

Template for the Communication Plan (Internal and External)

Event/Initiative	Target Audience	Objective	Timing	Vehicles	Sender	Responsible for Developing Content